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Class Specifications
for the Class:

TAX SPECIALIST

Class Distinguishers:

Complexity: This class reflects responsibility for providing various technical tax services to taxpayers and departmental staff, through the issuance of letter rulings in response to highly technical taxpayer inquiries requiring interpretation and application of tax laws, rules and regulations based on policies set by the Director's Office; development of public education and information programs and materials pertaining to technical tax matters; development of new and revised tax forms and instructions; and the issuance of responses to media inquiries concerning technical tax issues. The work also includes conducting education and information sessions on technical tax matters for the public; conducting internal training and providing assistance to divisional taxpayer services personnel who respond to technical taxpayer inquiries; and reviewing for approval/disapproval applications from taxpayers for exemption from conveyance tax and general excise tax.

Personal Contacts: Personal contacts include tax return preparers, attorneys, certified public accountants, special interest groups and taxpayers, in responding to highly technical tax matter inquiries, and conducting educational and informational sessions; media representatives in planning and coordinating media program activities; and other divisional taxpayer services personnel to provide training and assistance on technical tax matters.

Supervision Received: Assignments are performed independently, subject to general supervisory review for technical accuracy and conformance with departmental policies.

Full Performance Knowledge and Abilities: (*Knowledge and abilities required for full performance in this class.*)

Knowledge of: State and related federal tax laws, rules and regulations; court decisions and legal tax opinions of the Attorney General; departmental policies, procedures and operations; basic tax accounting concepts and methodologies; various tax return forms and filing requirements; research and problem solving methods and

techniques; and methods of editing and writing informational tax materials.

Ability to: Interpret and apply tax laws, rules and regulations; analyze facts and make sound decisions; develop tax return forms; present technical information in a clear and concise manner, orally and in writing; prepare informational tax materials; speak before groups and the media; and establish and maintain effective relationships with others.

Examples of Duties: *(Positions may not be assigned all of the duties listed, nor do the examples necessarily include all the duties that may be assigned. The omission of specific statements does not preclude management from assigning such duties if such duties are a logical assignment for the position. The classification of a position should not be based solely on the examples of duties performed.)*

1. Develop and issue letter rulings based on policy set by the Director's Office, by composing and preparing replies to highly technical tax inquiries from attorneys, certified public accountants, other tax preparers and taxpayers.
2. Develop and design State tax forms and instructions administered by the department.
3. Review and revise State tax forms and instructions according to tax law changes.
4. May serve as forms coordinator and assist in the work of the tax Forms Control Committee in planning, coordinating and approving new and revised State tax forms and instructions.
5. Plan, develop and conduct technical educational and informational sessions for tax professionals and other special interest groups on technical tax matters.
6. Plan, organize and conduct training sessions on technical tax matters for divisional taxpayer services personnel to maintain or update knowledge of tax laws, rules and regulations, and departmental tax policies.
7. Develop and write tax information publications, handouts, guide materials, etc., supplementary to technical releases from the departmental Rules Office.
8. Provide responses to media inquiries on technical tax

- matters by writing press releases; participating as a radio or television program panelist or speaker; recording public service announcements; etc.
9. Review and approve/disapprove applications for conveyance tax exemption submitted by individuals, business organizations, trust, and other organizations.
 10. Review and approve/disapprove applications for exemption from payment of the general excise tax.
 11. Analyze and research questions on complex tax issues assigned, and prepare responses for dissemination to departmental personnel.
 12. Provide assistance to divisional staff on technical or highly technical tax issues and problems.
 13. Conduct special studies on new or unusual tax issues for developing and issuing clarifying guide materials and publications.
 14. Review and prepare comments and recommendations on drafts of legislative bills, administrative rules, and Tax Information Releases.
 15. Coordinate matters of mutual interest and concern with other departmental divisions, and where appropriate, with other governmental agencies, tax practitioners, and industrial and trade associations, by clarifying technical tax related matters.

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This is the first specification for the new class TAX SPECIALIST.

Effective Date: 4/7/99

DATE APPROVED: 4/7/99 /s/ Diana H. Kaapu
MIKE McCARTNEY
Director of Human Resources Development